

Vegetables - US - 2021

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and the vegetables market
- Produce purchase factors and locations
- Drivers of vegetable purchase
- Attitudes toward vegetables

Half of consumers aged 18-34 consider "plant-based" protein alternatives to be a good source of vegetables, indicating that there is a new and trending competitor for vegetables while simultaneously acknowledging that younger consumers will tolerate "healthy" foods that are clearly processed, opening the door for more convenient, prepared vegetables. Both ideas point to opportunity for vegetable brands to double down on messages of the inherent and natural benefits of vegetables.

The pandemic led to 18% sales growth for vegetables in 2020. While it won't match that pace in 2021-22, brands can maintain a degree of that momentum through a combined focus on convenience, nutrition and sustainability.

The biggest potential threat to vegetables is one facing most CPG categories, namely if consumers quickly return to their pre-COVID behaviors, dining out will rapidly increase as consumers gain confidence. Pre-COVID, foodservice spending was rising, but healthy eating initiatives and economizing are likely to prompt consumers to retain a portion of their increased at-home meal and snack-time behaviors.

With a return of some pre-pandemic norms, time constraints will prompt consumer demand for more convenient and easy-to-prepare options, particularly as many consumers face cooking fatigue and seek guidance in terms of meal-planning or preparation.



"The dramatic increase in at-home cooking prompted considerable growth for the vegetable category in 2020. A slow return to certain pre-pandemic behaviors will lead to a slight sales correction, but the need for more-convenient yet still healthy foods will see consumers turn to produce that has been pre-cut, seasoned and ready-to-cook."

– Billy Roberts, Sr. Analyst –
Food and Drink

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **Key issues covered in this Report**
- **Definition**
- **Market context**
- **Economic and other assumptions**
- **COVID-19: US context**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**

Figure 1: Total US sales and fan chart forecast of vegetables, at current prices, 2016–26

Figure 2: Total US retail sales and forecast of vegetables, at current prices, 2016–26

- **Impact of COVID-19 on vegetables**

Figure 3: Impact of COVID-19 on vegetables, 2021

- **Challenges and opportunities**

- **Protein alternatives seen as vegetable source**

Figure 4: Protein alternatives as vegetable source, by age, 2021

- **Refresh BFY communications to reach young adults**

Figure 5: Impact of health claims on vegetable purchase, by age, 2021

- **Meet younger adults online for convenience and value**

Figure 6: Produce purchases online from physical retailers, by age, 2021

- **Activate parents with innovation and ideas**

Figure 7: Vegetable preparation needs, any agree, by parental status, 2021

THE MARKET – KEY TAKEAWAYS

- **Steady growth to dramatic pandemic-related increases**
- **Pre-pandemic trends return quickly for packaged segments**
- **Consumer aspirations provide opportunity for vegetables**

MARKET SIZE AND FORECAST

- **Sales slow as new “normal” sets in**

Figure 8: Total US sales and fan chart forecast of vegetables, at current prices, 2016–26

Figure 9: Total US retail sales and forecast of vegetables, at current prices, 2016–26

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

SEGMENT PERFORMANCE

- **Shelf-stable and frozen segments rapidly resume pre-COVID trends**

Figure 10: Sales of vegetables, by segment, 2016-26

Figure 11: Total US retail sales and forecast of vegetables, by segment, at current prices, 2016-26

- **Familiarity and vegetable variety boost supermarket vegetable sales**

Figure 12: Total US retail sales of vegetables, by channel, at current prices, 2016-21

MARKET FACTORS

- **Unenthusiastic cooks in search of healthy convenience**
- **Price drops to give way to inflation**
- **Vegetables are the OG plant-based**
- **Vegetable versatility falls short of other sides**

Figure 13: Qualities associated with selected side dishes, 2021

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Private label maintains share lead, while big brands also make gains**
- **Sustainable = natural 2.0**
- **Meat alternatives emerge as competitors**

MARKET SHARE

- **Pandemic drives consumers to comforting frozen foods**
- **Sales of vegetables by company**

Figure 14: Multi-outlet sales of vegetables, by leading companies, rolling 52 weeks 2020 and 2021

COMPETITIVE STRATEGIES

- **Grilled options help guide flavor exploration**
- **Brands lean into sustainable**
- **Cauliflower power**

MARKET OPPORTUNITIES

- **Refresh vegetables' benefits**

Figure 15: Impact of health claims on vegetable purchase, by age, 2021

- **Identify vegetables as healthier than alternatives**

Figure 16: Protein alternatives as vegetable source, by age, 2021

- **Purchase shifts online for all produce segments**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 17: Produce purchases online from retailers, by select demographics, 2021

THE CONSUMER – KEY TAKEAWAYS

- **Break boredom, add value to sustain and grow engagement**
- **Consumers turning to a wider variety of vegetables**
- **Freshness leads category drivers**
- **Supermarkets remain top choice for vegetable purchase**
- **Vegetable use largely at mealtimes**
- **Nutrition and convenience are worth the price to parents**
- **Guide consumers to the nutritionally beneficial**

VEGETABLE CONSUMPTION

- **Fresh in all formats top the list of vegetable consumption**
Figure 18: Vegetable consumption, 2019 and 2021
- **Easier options appeal to younger consumers**
Figure 19: Vegetable consumption, by age, 2021
- **Consumers look to boost vegetable consumption**
Figure 20: Produce consumption changes, 2021
- **Meal prep and planning support in the quest for increased consumption**
Figure 21: Repertoire analysis – Vegetable consumption, 2021
- **Local and the environment resonate with most-active vegetable consumers**
Figure 22: Vegetable purchase and consumption behavior, by repertoire of vegetable consumption, 2021

VEGETABLE PURCHASE AND CONSUMPTION BEHAVIOR

- **Maintain momentum by breaking the boredom in the kitchen**
Figure 23: Vegetable purchase and consumption behavior, 2021
- **Value perception eludes organic and local**
Figure 24: Vegetable purchase and consumption behavior, by household income, 2021

PRODUCE PURCHASE FACTORS

- **Freshness and wellbeing to drive consumers**
Figure 25: Produce purchase factors, 2021
- **Vegetables' natural appeal to parents**
Figure 26: Produce purchase factors, by parental status, 2021

PRODUCE PURCHASE LOCATION

- **Supermarkets top the list of vegetable sources**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 27: Produce purchase location, 2021

- **Produce purchase begins online shift, but with trusted retailers' websites**

Figure 28: Produce purchase online, by select demographics, 2021

VEGETABLE OCCASIONS

- **Innovation spurring usage beyond mealtimes**
- **Identify advantages of vegetables for younger consumers**

Figure 29: Vegetable usage, by daypart, 2021

Figure 30: Vegetable usage, by age, 2021

VEGETABLE TYPES, PERCEPTION AND USES

- **Link packaged varieties to their nutritional attributes**

Figure 31: Correspondence analysis – Symmetrical map – Vegetable types, perception and uses – 2021

Figure 32: Vegetable types, perception and uses, 2021

ATTITUDES TOWARD VEGETABLES

- **Reach under 55s with contemporary health features**
- **Focus on cleaner approach to nutrition**
- **Beyond sustainable and into the realm of regenerative**
- **Both inspiration and innovation can support increased consumption**

Figure 33: Health and claims, any agree, by age, 2021

Figure 34: Vegetables and nutrition, any agree, by age, 2021

Figure 35: Sustainability and vegetables, any agree, by household income, 2021

Figure 36: Vegetable preparation attitudes, any agree, by parental status, 2021

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations

APPENDIX – THE MARKET

Figure 37: Total US retail sales and forecast of vegetables, at current prices, 2016–26

Figure 38: Total US retail sales and forecast of vegetables, at inflation-adjusted prices, 2016–26

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Figure 39: Total US retail sales and forecast of vegetables, by segment, at current prices, 2016–26
- Figure 40: Total US retail sales of vegetables, by segment, at current prices, 2019 and 2021
- Figure 41: Total US retail sales and forecast of fresh vegetables, at current prices, 2016–26
- Figure 42: Total US retail sales and forecast of fresh vegetables, at inflation-adjusted prices, 2016–26
- Figure 43: Total US retail sales and forecast of frozen vegetables, at current prices, 2016–26
- Figure 44: Total US retail sales and forecast of frozen vegetables, at inflation-adjusted prices, 2016–26
- Figure 45: Total US retail sales and forecast of shelf-stable vegetables, at current prices, 2016–26
- Figure 46: Total US retail sales and forecast of shelf-stable vegetables, at inflation-adjusted prices, 2016–26

APPENDIX – COMPANIES AND BRANDS

- Figure 47: Multi-outlet sales of vegetables, by leading companies, rolling 52 weeks 2020 and 2021
- Figure 48: Multi-outlet sales of frozen vegetables, by leading companies and brands, rolling 52 weeks 2020 and 2021
- Figure 49: Multi-outlet sales of shelf-stable vegetables, by leading companies and brands, rolling 52 weeks 2020 and 2021

APPENDIX – CONSUMER

- Figure 50: Average household spending on vegetables, 2016–21

APPENDIX – RETAIL CHANNELS

- Figure 51: Total US retail sales of vegetables, by channel, at current prices, 2016–21
- Figure 52: Total US retail sales of vegetables, by channel, at current prices, 2019 and 2021
- Figure 53: US supermarket sales of vegetables, at current prices, 2016–21
- Figure 54: US sales of vegetables through other retail channels, at current prices, 2016–21

APPENDIX – CORRESPONDENCE ANALYSIS – VEGETABLES – METHODOLOGY

- Figure 55: Correspondence analysis – Symmetrical map – Vegetable types, perception and uses, 2021

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 56: Correspondence analysis – Principal map –
Vegetable types, perception and uses, 2021

Figure 57: Vegetable types, perception and uses, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.